

COMPREHENSIVE ASSESSMENT

Client Name: _____ **ID#:** _____ **DOB:** _____ **Age:** _____

Would you like to be referred to by any other name? _____ **Assessment Start Date:** _____

MEDICAL

All medical information must be verified and documented. This includes verification of HIV status, most recent lab results, and TB status. Examples of verification include, but are not limited to, lab reports, HASA enrollment, letter from a physician or medical provider, or medical personnel, i.e. social worker, etc.

HIV/AIDS STATUS (Primary Diagnosis):

What is current HIV status? (From medical verification, where possible):

___ HIV+/Asymptomatic ___ HIV+/Symptomatic ___ AIDS

Transmission Route _____

___ Pending Test/Unknown-at Risk If unknown, what are the risk factors? _____

Verification in chart? ___ Yes ___ No Method of verification: _____

Does client want to be tested for antibodies to HIV? ___ Yes (discuss pre-test counseling/referral) ___ No

CD4 Count _____ Date _____ Viral Load _____ Date _____

Document attempts to obtain:

Does client understand meaning of VL & T-Count and how to read lab results? (Explain):

Does client need referral for further HIV information/education? ___ Yes ___ No

CURRENT MEDICAL CARE

Is client receiving medical care? ___ Yes ___ No

Is client enrolled in a SNP? ___ Yes ___ No

If yes, name: _____ CM: _____

LIST PHYSICIANS, HOSPITALS, AND HEALTH CLINICS WHERE CLIENT RECEIVES HIV HEALTH CARE TREATMENT AND/OR OTHER HEALTH CARE SERVICES:

Type of Provider	Name	Address/Phone	Contact	Last Appointment Date
Primary:				
Gyn (if different):				
Other (ex: Urologist):				

How often does client see PCP? _____

Does client schedule own appointments? ___ Yes ___ No

Identify any barriers that prevent client from keeping appointments:

How does client assess/perceive level of HIV care received from PCP?

Last hospitalization: _____ Place: _____

Nature of most recent hospitalization: _____

In client's own words, how would she/he describe her/his health? (Has her/his health recently improved or declined; has there been a significant change in T-cell/VL; are there concerns around her/his health; does she/he think the medication regimen is working, etc.)

HIV Related Medical Problems: Indicate opportunistic infections reported by client or physician. The following lists common AIDS related illnesses. Check if yes and indicate the last date of illness/infection. This is **not** a comprehensive list. Please list any other HIV related medical problems under "Other HIV Related Symptoms" and include the last date of illness/infection.

	Yes	Date		Yes	Date
Candidiasis of bronchi, trachea, or lungs	_____	_____	Kaposi's Sarcoma	_____	_____
Candidiasis, esophageal	_____	_____	Lymphoma, Burkett's	_____	_____
Cervical cancer, invasive	_____	_____	Lymphoma, immunoblastic	_____	_____
Oral Thrush	_____	_____	Lymphoma, brain	_____	_____
Cryptococcus, extra pulmonary	_____	_____	Mycobacterium Avium Complex	_____	_____
Cryptosporidiosis, intestinal	_____	_____	Mycobacterium Tuberculosis	_____	_____
Cytomegalovirus Disease	_____	_____	Pneumocystis pneumonia (PCP)	_____	_____
Cytomegalovirus Retinitis	_____	_____	Pneumonia, recurrent	_____	_____
Encephalopathy, HIV-related	_____	_____	Multifocal leukoencephalopathy	_____	_____
Herpes Simplex, recurrent	_____	_____	Recurrent Vaginal Candidiasis	_____	_____
Histoplasmosis	_____	_____	Toxoplasmosis, brain	_____	_____
Peripheral Neuropathy	_____	_____	Wasting Syndrome	_____	_____
Avascular (i.e. bone) necrosis	_____	_____	Lipodystrophy	_____	_____

OTHER HIV RELATED SYMPTOMS:

MEDICATIONS

The AIDS Institute updates the Medication List form on a quarterly basis for use with assessments and reassessments. Using the most recent copy of the AI Medication List form - please print a blank form, complete and replace this page with client's current medications.

ALLERGIES/ASTHMA - List known allergies:

No known allergies

Does client suffer from Asthma? Yes No
If Yes, is client being treated via Meds/Inhaler/Oxygen? Yes No
Does the client smoke? Yes No
Does the client indicate willingness to stop smoking? Yes No
Does client want/need referral to Stop Smoking Program? Yes No

Other conditions (ex. Diabetes, Hypertension, Heart Disease, etc.):

ADHERENCE:

How does she/he feel about taking the prescribed medication? _____

What is important to her/him about her/his medication? _____

Comments (discuss side effects, difficulties following regimen, and barriers to taking medications *as prescribed*):

Does she/he understand the consequences of missing doses? _____ Yes _____ No
Does client feel she/he knows enough about the medication she/he is taking? _____ Yes _____ No
How does client usually take meds (check all that apply)? _____
Always takes all pills on time according to the directions. _____
Sometimes misses or forgets to take pills. _____
Not too careful about taking pills. _____
Not sure. _____

Explain the client's level of understanding regarding the need to eat/not eat with certain medications:

From what pharmacy does the client access medications? _____

ADHERENCE CONCERNS/INSIGHTS: Summarize your discussion about "taking medications" and the client's understanding of the consequences of missing a dose. **NOTE: If the participant has serious barriers to understanding adherence, summarize the barriers below. Add to Service Plan, notify primary care provider, and set up an appointment with an adherence specialist/treatment educator/supervisor.**

CLINICAL TRIALS

Does the client know what a Clinical Trial is? Yes No
Has the client ever participated in Clinical Trials? Yes No
Is the client currently participating in a trial? Yes No
Is the client interested in discussing options? Yes No

(Any information related to Clinical Trials should be discussed during the next medical case conference)

WOMEN'S HEALTH ISSUES

Date of last OB/GYN exam: _____

Was PAP test done within the last six months? _____ Yes _____ No

Date of last Pap: _____ Results: _____

Is client pregnant? _____ Yes _____ No

LMP (last menstrual cycle): _____

(Discuss if time sequence seems unusually long): _____

If over age 40, approximate last date of mammogram: _____ Results _____

Sexually Transmitted Disease (STD) History:

STD	Date of Diagnosis	Treatment		Comments (current symptoms, on meds)
		Yes	No	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

What are client's thoughts on family planning? _____

Is family planning in place? _____

Comments: _____

If client is pregnant, complete the following:

Estimated # of weeks _____

Is client receiving prenatal care? _____ Yes _____ No

Is client on Anti-Retroviral Therapy? _____ Yes _____ No

Has client informed HASA/PA worker of pregnancy (budget revisions)? _____ Yes _____ No

Other women's health issues/comments (include client's need for regular mammograms if over 40, menopause if applicable, description of client's hygiene, etc.):

Is HIV verification in chart? _____ Method of verification _____

MEN'S HEALTH ISSUES

Has client undergone a Prostate Exam? _____ Yes _____ No Date: _____

Has client undergone a Testicular exam? _____ Yes _____ No Date: _____

Sexually Transmitted Disease (STD) History:

STD	Date of Diagnosis	Treatment		Comments (current symptoms, on meds)
		Yes	No	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

What are client's thoughts on family planning? _____

Is family planning in place? _____

Comments: _____

OTHER MEN'S HEALTH ISSUES/COMMENTS

(Include description of client's hygiene; inquire if client is taking erectile dysfunction medication, i.e., Viagra, Cialis or Levitra):

TRANSGENDER HEALTH ISSUES

How does client identify? _____

HRT (hormone replacement therapy)? _____ Yes _____ No If yes, date started? _____

How does client access HRT? _____

Name of physician if prescribed by other than regular PCP: _____

Is regular PCP aware of other physician's treatment? _____ Yes _____ No

STD	Date of Diagnosis	Treatment		Comments (current symptoms, on meds)
		Yes	No	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Other transgender health issues/comments (include client's need for referrals to transgender specific health care or Gender Identity Project, etc., description of client's hygiene, etc.):

GENERAL HEALTH ISSUES

Client's TB status is: Positive Negative Anergic Not Known

Client on TB medications? Yes No PPD Date: _____ Chest X-Ray Date: _____

Is client currently on Directly Observed Therapy (DOT)? Yes No

If yes, program is: _____ If no, need for DOT referral? Yes No

Is client experiencing any barriers to taking medications on schedule? Yes No

If yes, explain:

Has client completed TB treatment in the past? Yes No Date completed _____

Follow-up needed for family/collaterals? Describe. _____

HEPATITIS

Has client ever been treated for Hepatitis? Yes No Screening Date: _____

Type of Hepatitis Test: A B C Results: _____

Is client currently being treated for Hepatitis? Yes No

Type of Treatment: _____

Has client been vaccinated? A B No

Has client been provided information on Hepatitis and HIV (Hepatitis/HIV pamphlet)? Yes No

If no, explain: _____

All medical information discussed thus far should be verified, documented, and discussed with the medical provider either via the social worker, nurse practitioner, or if necessary, the physician.

DENTAL CARE

Does client receive ongoing dental care? Yes No Date of last visit: _____

Provider: _____ Address: _____

Phone: _____

Comments on dental problems or barriers to services (i.e. lack of access to providers, fear of dentists, etc.):

VISION CARE

Does client receive ongoing vision care? Yes No Date of last visit: _____

Provider: _____ Address: _____

Phone: _____

Comments on vision problems or barriers to services (i.e. lack of access to providers, fear of exam, etc.):

NOTE: *If CD4<200, explain to client possible effects of HIV on vision (i.e. CMV retinitis) and add to service plan objective of completing eye exam EVERY SIX MONTHS.*

WELLNESS

NUTRITION

Ask client to describe appetite:

How many meals during the day? _____ Type of food (fast food, cooks at home)? _____

Is client taking food supplements? Yes No **If yes, please add to medication section.**

Has client experienced a significant weight change recently? Yes No Explain any change:

Does client need a referral to a nutritionist? Yes No

COMPLEMENTARY/ALTERNATIVE THERAPIES

Is the client accessing complementary/alternative therapy (i.e. massage, acupuncture, herbal remedies)? Yes No

Explain:

Is client interested in obtaining information on complementary/alternative therapies? Yes No

Comments:

(If client expresses interest, discuss interest or use during next medical case conference)

HOME CARE

Is client currently receiving home care? Yes No (When no, SKIP to bolded area in HOME CARE section.)

Home Care Agency: _____ Phone #: _____

Name of Nurse/Home Health Aide: _____

How does client feel about current home care? _____

Indicate which services are being utilized:

Nursing Visits per week Occupational therapy Days per week
 Physical Therapy Days per week Other _____

Is client in need of an evaluation for home care services? Yes No

Comments:

TRANSPORTATION

Does client have regular access to transportation? Yes No Inconsistent _____

What is client's usual method of transportation? _____

Describe client's transportation needs: _____

EMPLOYMENT/EDUCATION

EMPLOYMENT STATUS:

Employed ___ Job Training Program ___ Stipend position ___ Unemployed ___ Disabled ___

Comments (employer information, occupation, hours per week, etc.): _____

Comments (name of job training program and counselor, phone #): _____

Comments (previous job history): _____

NOTE: When client states she/he works "off the books," please advise the client of the need to alert the DSS/HASA/HRA worker of the additional income; also remind the client of the need to report any income to appropriate government agencies (i.e. IRS).

EDUCATION

Indicate highest grade/degree of education reached by client: _____

What language(s) does client speak fluently? _____

Can client:
Read English? ___ Yes ___ No Read (other)? ___ Yes ___ No Name of language(s): _____

Write in English? ___ Yes ___ No Write (other)? ___ Yes ___ No _____
Comment on client's interest in educational opportunities (GED) and/or job training: _____

FINANCIAL RESOURCES/ENTITLEMENTS

Total monthly income: _____ Total Monthly Expenses: _____ Medicaid #: _____

Source	Amount	Source	Amount
Wages	_____	Alimony	_____
Social Security	_____	Child Support	_____
Public Assistance	_____	Unemployment	_____
SSI/SSD	_____	Veteran's Benefits	_____
Medicaid/Medicare	_____	Enhanced Rent	_____
HASA	_____	Energy Assistance	_____
ADAP	_____	Food Stamps	_____
WIC	_____	Other	_____

Does client have outstanding debts? _____ Yes _____ No

Explain:

Does client have a representative payee? _____ Yes _____ No Who? _____

Is client/household income sufficient to meet basic needs? _____ Yes _____ No

If no, explain situation:

Evaluate client's ability to manage his/her own finances:

Does the client need a fair hearing/appeal process for any denials of entitlements? _____ Yes _____ No

Explain situation:

Medicaid re-certification date: _____ **Any spend-down amount?** _____

Is client in need of a referral for additional food sources (i.e. Momentum Food Project, God's Love We Deliver, local soup kitchens, etc.)? _____ Yes _____ No (If yes, add to Service Plan)

Name of HASA/PA Worker: _____ Phone #: _____

Comments (include any difficulties with worker):

HOUSING
A HOME VISIT MUST BE COMPLETED AS PART OF THE ASSESSMENT PROCESS

Date of home visit: _____

If home visit not conducted, why? _____

Current housing situation (rent apartment, scatter-site, _____
 congregate, nursing home, shelter, SRO, friends): _____

Is it stable? ___ Yes ___ No

Has client been assisted with housing before? ___ Yes ___ No If yes, by whom? _____

How many times has client moved from apartments in the past 5 years? _____

Reasons:

Can client pay her/his portion of the rent?	___ Yes ___ No	Does client have a checking account?	___ Yes ___ No
Can client write out a check/money order?	___ Yes ___ No	Does client have problems paying the rent?	___ Yes ___ No
Has client been in rent arrears?	___ Yes ___ No	Is client legally assisted with rent issues?	___ Yes ___ No
Has client ever lived alone?	___ Yes ___ No	Does client feel comfortable living alone?	___ Yes ___ No
Does client plan to live alone?	___ Yes ___ No	If no, with whom?	

Does client think she/he would benefit from living in supportive living? ___ Yes ___ No

Does client have concerns living in housing provided by an AIDS organization? ___ Yes ___ No

Comments (current housing situation, barriers to housing placement, financial management, and possible referrals):

PARENTING AND FAMILY AND SOCIAL SUPPORTS

Does client have any minor children under the age of 21? ___ Yes ___ No (If no, skip.)

This needs to be completed regardless of child's HIV status or living arrangement. For minor children living outside of the home, an assessment needs to be completed indicating what needs the child may have and who the primary caregiver is that is meeting these needs (address any deficits in meeting child's needs).

List all minor children considered to be part of the household:

Name	Sex	Age	HIV Status	Living in home? (Yes or No)	Living with other? (specify)	Aware of client's HIV status? (Yes or No)	Aware of own HIV status? (Yes or No)
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

Describe current relationship with children listed above:

If client has minor children living outside of the home, does client wish to have increased contact and/or custody of children? Yes No Comments: _____

Is there a need for any of the following:

Parenting skills training? Yes No Specify: _____

Respite care? Yes No Specify: _____

Child Care? Yes No Specify: _____

Is there suspected/confirmed child abuse/neglect? Yes No Explain: _____

Is CPS/ACS involved? Yes No Explain: _____

NOTE: It is our responsibility as mandated providers to report suspicion of child abuse and/or neglect.

FAMILY SUPPORT [Not minor children]

Client's current spouse/partner: _____ Spouse/Partner's HIV status: _____

Is spouse/partner aware of client's HIV status? Yes No Not sure

Is client in need of a referral to partner notification services? Yes No

Who does client identify other family/collateral support or significant others? (Include parents, siblings, significant others who ARE supportive.)

Name	Relation-ship	Age	HIV Status	Address	Phone #	Aware of client's HIV status? (yes or no)
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Describe family relationship/patterns of communication, roles, and types of support: [i.e., Who would you go to if you were depressed, needed money, needed someone to talk to, etc.?] _____

Are the client's parents living? Mother: Yes No Father: Yes No

If yes, describe your relationship: _____

How would you describe your childhood? _____

DOMESTIC VIOLENCE

DOMESTIC VIOLENCE ASSESSMENT

Does the client report feeling unsafe in her/his current living arrangement? Yes No

If yes, describe:

How is the situation today?

Does the client report feeling afraid that she/he will resort to physical force when interacting with a significant other OR her/his children? Yes No Explain any "Yes" answers:

Does the client believe that domestic violence is an issue at this time? Yes No If yes, explain:

Is client currently in a program that is addressing this issue? Yes No If yes, explain:

If client does not believe that violence is an issue, does **worker** have any reason to believe that this is an issue? Yes No If yes, explain:

PARTNER/SPOUSAL NOTIFICATION

Are there past/present partners (sexual or needle sharing) with whom the client has **not** discussed her/his HIV status with? Yes No
(if no, skip this section)

Discuss importance/benefits of partner notification with client!

Options Discussed: Self Notification Notification with assistance by PNAP/CNAP
 Joint Notification Notification by Health and Human Service Provider
 Client declines to notify partner

What issues need to be resolved to encourage partner/spousal notification?

SUBSTANCE ABUSE AND MENTAL HEALTH

SUBSTANCE ABUSE HISTORY

Does client have a history of drug/alcohol use? ___ Yes ___ No If no, then leave blank and skip to **Mental Health History.**

Drugs used currently or in the past:

Type	Frequency of Use	Route of Administration	Amount	Date of Last Use
Nicotine	_____	_____	_____	_____
Alcohol	_____	_____	_____	_____
Marijuana	_____	_____	_____	_____
Cocaine	_____	_____	_____	_____
Crack	_____	_____	_____	_____
Heroin	_____	_____	_____	_____
Hallucinogens	_____	_____	_____	_____
Crystal Meth	_____	_____	_____	_____
Other	_____	_____	_____	_____

TREATMENT HISTORY

Has client ever sought treatment for alcohol/drug use? ___ Yes ___ No. If no, leave blank and skip to Mental Health History.

Past Dates	Modality	Place	Completed? (yes or no)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Note past barriers to or reasons why program was not completed:

CURRENT TREATMENT

Is client currently enrolled in substance abuse treatment? ___ Yes ___ No If yes, length of time: _____

Current and post modalities	Date	Comments
Detox (7 day or 28 day)	_____	_____
Recovery Readiness	_____	_____
Harm reduction/Needle exchange	_____	_____
Inpatient substance use program	_____	_____
Outpatient substance use program	_____	_____
Methadone Maintenance (# of mg)	_____	_____
Outpatient alcohol program	_____	_____
Inpatient alcohol program	_____	_____
AA/NA or other self-help group	_____	_____
Stop Smoking Program	_____	_____

Name and address of program attending: _____

Worker name: _____
Worker phone #: _____
Frequency of visits: _____
Comment on client's ability to keep appointments: _____

Regardless of treatment history, does the client consider her/himself in recovery? ___ Yes ___ No

What has helped client remain clean?

Does client have an awareness of what her/his relapse "triggers" are? Discuss:

If client is ACTIVELY using a substance:

Are harm reduction methods being used? ___ Yes ___ No (Refer to HIV Prevention) Explain:

Does client indicate or state a willingness to stop? ___ Yes ___ No Explain: _____

What attempts have been made to stop using?

Evaluate client's willingness to stop using alcohol/drugs:

Is the client interested in addressing substance use? ___ Yes ___ No
Is referral for substance abuse treatment warranted? ___ Yes ___ No

MENTAL HEALTH HISTORY

Has client ever received psychiatric or mental health treatment? ___ Yes ___ No

If yes, please indicate diagnosis as reported by client: _____

If yes, please indicate symptoms as reported by client: _____

Comments (If yes above, please conference with mental health providers):

Current and Past Modalities

Check Modality	Date	Comments
____ Support group	_____	_____
____ Individual counseling/therapy	_____	_____
____ Family counseling	_____	_____
____ Outpatient psych (Private PhD/MD)	_____	_____
____ Inpatient psychiatric care	_____	_____
____ Other mental health care	_____	_____

Has client ever been hospitalized for a psychiatric condition? ___ Yes ___ No

Dates: _____ Where: _____ For: _____

Name of Clinician (current/most recent): _____ **Frequency of Visits:** _____
 Address: _____
 Phone #: _____

Does client keep appointments? ___ Yes ___ No Inconsistent because? _____

Currently or ever prescribed medication for a psychiatric/emotional condition? Yes No

Prescribed Medication	Purpose	Dosage/Frequency	Last Use (approximately if in the past year)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Feelings about prescribed medication: _____

Does client report adherence to this medication regimen? ___ Yes ___ No ___ Inconsistent

Barriers to taking medication as prescribed: _____

Has client ever attempted suicide? ___ Yes ___ No Discuss (i.e. approximate dates, method, and precipitating events):

Has client ever had thoughts of hurting her/himself? ___ Yes* ___ No Explain: _____

LEGAL

Has client ever been incarcerated? ___ Yes ___ No

If yes:

Where? _____	When? _____	Nature of Incarceration: _____	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Is client currently on probation or parole? ___ Yes ___ No

If yes, until when? _____ Name of Parole/Probation Officer: _____
 Phone # of Parole/Probation Officer: _____

Is client currently serving any type of sentence (i.e. community service hours, etc.)? ___ Yes ___ No
 Explain:

Does client have any outstanding warrants/summonses/cases pending? ___ Yes ___ No
 Explain:

Is client in need of assistance with any of the following?

	Yes	No	In-Place	Comments
Health Care Proxy	_____	_____	_____	_____
Living Will	_____	_____	_____	_____
Power of Attorney	_____	_____	_____	_____
Immigration	_____	_____	_____	_____
Permanency Planning	_____	_____	_____	_____
Standby Guardianship	_____	_____	_____	_____

HIV PREVENTION WITH POSITIVES

SAFER SEX/DRUG USE:

Describe current risk behaviors:

The following risk and harm reduction information was discussed on (date): _____

Does the client currently have a sex partner or partners? Yes No

Are their partner(s) aware of their own HIV status? Yes No

Do they need help getting tested? Yes No

How is the client doing practicing safer sex?

What works for the client and what doesn't when it comes to safer sex (e.g. condom use, dental dam, etc.)?

Does being high or drinking get in the way of practicing safer sex? Yes No

Summarize discussion, including safer sex information provided:

Would the client like to work with a trained counselor/educator person to help improve safer sex practices? Yes No

IF THE CLIENT IS ALSO INJECTING DRUGS:

What works for the client and what doesn't when it comes to using a new or clean syringe and works with every shot?

Does the client ever find her/himself in a situation where they are sharing syringes or works? Yes No

Does the client know she/he can get clean syringes, help practicing safer drug use through a syringe exchange program, or purchase syringes at an ESAP pharmacy/hospital? Yes No

Summarize your discussion with the client about drug-related harm reduction methods:

Do they need a referral? Yes No

SUBSTANCE USE BEHAVIOR

Drug Use: Yes No

Needle Sharing: Yes No

Use of Bleach: Yes No

Comments: _____

UNIVERSAL PRECAUTIONS

Does the client understand how to protect household members from exposure to HIV? ___ Yes ___ No
Briefly describe their understanding:

Does the client require referral for further information? ___ Yes ___ No

Comments:

OTHER AGENCIES SERVING THE CLIENT AND FAMILY/COLLATERALS:

Name	Service	Agency Contact	Phone Number
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>	<hr/>

Please Note: This ASSESSMENT is not complete without the cover sheet.

All signatures are to be entered on the coversheet.